

Medicare Part D Subsidy Outreach Plan

March 2005

Background

The Social Security Administration will process Medicare Part D subsidy applications based on legislative changes under the Medicare Prescription Drug, Improvement, and Modernization Act of 2003 (MMA). The Medicare Part D program is effective January 2006. Medicare beneficiaries who meet low income and resource limits are eligible to receive a subsidy, as well as cost-sharing and premium assistance for prescription drugs. It is essential that Part D subsidy applications be processed as quickly as possible to ensure that applicants receive the full benefit.

All Medicare beneficiaries who are entitled to Part A and/or enrolled in Part B and reside in the 50 states or Washington D.C. are eligible to apply for the subsidy. Medicare beneficiaries already dually entitled to Medicare and Medicaid, beneficiaries in a Medicare Savings Program, such as QMB, SLMB or QI, and SSI eligibles are deemed eligible for the subsidy and do not need to apply. Deemed eligibility will be established via a systems match and all those deemed eligible will receive a mailing from the Centers for Medicare and Medicaid Services (CMS) advising them of their entitlement to the subsidy.

In addition, the Agency will screen low-income Medicare beneficiaries to identify those potentially eligible for the Part D subsidy. Starting in late May 2005, we will send a letter, a scannable subsidy application and a postage-paid, return-addressed envelope (to WBD0C) to beneficiaries whose income appears to be less than 150% of the Federal Poverty Level (FPL).

The Medicare Part D program initial enrollment period is November 15, 2005 through May 15, 2006. However, Social Security will begin processing subsidy applications during an advance filing period. Although individuals cannot apply for the Part D program until November 15, 2005, and prescription drug coverage is not effective until January 1, 2006, it is essential that we proactively market early filing for the subsidy. The Agency must educate the public about the subsidy and encourage the public to apply for the subsidy as early as possible. To this end, Social Security can begin taking applications at the end of April 2005. (Bulk applications will be mailed to the field from March 11, 2005 through May 2, 2005.)

Social Security's Medicare Part D Subsidy Outreach Plan is designed to meet the needs of several distinct audiences and to reach as many people as possible who are potentially eligible for the subsidy. Working with CMS and its partners, including the State Health Insurance Assistance Programs (SHIP), State Medicaid Agencies and the Departments of Aging is critical to the success of SSA's outreach efforts.

Goals

1. To inform people about the subsidy and maximize the number of people who apply for it during the advance filing period. The goal is to have 90% of those potentially eligible apply by December 2005.

2. To maximize the number of people who use the scannable application or the Internet application.
3. To minimize the number of applications filed by Medicare beneficiaries who are deemed eligible for the subsidy.
4. To direct people to appropriate sources for more information and assistance (e.g., Medicare website or 800 number; or SSA website or 800 number).
5. To maximize the effectiveness of outreach by partnering with CMS, the State Medicaid Directors, SHIPs, the Departments of Aging and other organizations that serve potentially eligible beneficiaries.
6. To train appropriate State and third party organizations to properly assist beneficiaries to file subsidy applications and submit them to SSA.
7. To take subsidy applications onsite in locations where potentially eligible beneficiaries are located.

Audiences

Primary: All Medicare beneficiaries potentially eligible for the subsidy.

Secondary:

1. People who assist Medicare beneficiaries (e.g., children, relatives, friends)
1. National organizations, advocacy groups, community-based organizations and State agencies
3. News media
4. Congressional office staff

Where to conduct outreach

SSA will reach audiences anywhere they can be located, including:

- Adult care facilities and adult homes
- Advocacy organizations
- Benefit Planning Assistance and Outreach (BPAO) organizations
- Churches, temples, mosques and other religious institutions
- Community-based organizations
- Congressional offices
- Departments of Aging, HUD, Meals on Wheels programs, nutrition programs
- Disability-related organizations
- Employers, including those who hire large numbers of seniors and people with disabilities
- Grocery stores
- Hospitals, doctors' offices, community health centers
- Libraries
- Nursing homes
- Pharmacies
- Post offices
- Prescription Drug Plan sponsors
- Senior centers

- State and local government agency offices, including One-Stops
- State Medicaid agencies
- Retail chains

Key Messages

1. You may be eligible for help with the Medicare Part D prescription drug premium, deductible and/or co-payments.
2. You apply for this help with the Social Security Administration.
3. You should apply as early as you can to find out if you can get this extra help.
 1. Apply for this help by using the form Social Security sent to you in the mail or by applying on the Internet at www.socialsecurity.gov beginning July 1, 2005.
4. You must enroll for Medicare Part D with an authorized prescription drug plan provider (not SSA, CMS or the state) between November 15, 2005 and May 15, 2006.

Roles

Office of Communications

- Develop national Medicare Part D Subsidy Outreach Plan
- Coordinate the development of national and regional tactical outreach plans
- Provide leadership and guidance for the outreach effort

Office of Public Inquiries

- Develop language regarding Part D subsidy inquiries
- Establish subject identifier for Part D subsidy inquiries
- Identify and process any inquiries regarding Part D subsidy
- Report any trends in Part D subsidy inquiries

Office of External Affairs

- Prepare a headquarters tactical plan and coordinate outreach activities at the national level that will facilitate regional and local outreach activities with CMS and third parties
- Coordinate series of application events
- Track headquarters outreach activities
- Provide public information tools, products and educational updates to national organizations and their affiliates
- Review feedback from headquarters and regions on effective outreach efforts and share best practices
- Prepare a tactical plan for evaluating the subsidy outreach campaign

Office of Communications Planning and Technology

- Develop scannable subsidy application in English and Spanish and provide for translation in 14 other languages for reference purposes
- Develop public information materials for Part D outreach
- Develop training materials for third parties, State Medicaid Agencies and community-based organizations

- Provide basic information to the public about Part D help

Office of Operations

- Conduct outreach events nationwide
- Coordinate outreach activities with CMS in the regions
- Provide training to SSA front-line employees about the subsidy and Part D
- Develop scannable subsidy application and Internet subsidy application in conjunction with the Office of Systems, the Office of Income Security Programs and the Office of Communications
- Develop training materials for third parties, State Medicaid Agencies and community-based organizations
- Train community-based organizations on the subsidy application
- Work with State and local partners on Part D initiatives to avoid duplication of efforts
- Take subsidy applications onsite in the community
- Receive and process applications for the Part D subsidy

Regional Communications Directors

- Prepare regional tactical plans for outreach
- Coordinate regional outreach activities
- Brief Congressional district staff on Part D subsidy application process and outreach activities
- Track outreach events within region
- Provide oversight, guidance and support to Public Affairs Specialists and Operations personnel planning and conducting outreach events
- Provide ongoing feedback to Central Office and other RCDs on experiences with outreach messages, methods, products and audience responses

Office of Legislation and Congressional Affairs

- Brief key Congressional staff on Part D subsidy application process and outreach activities
- Develop and maintain pages in "Information for Congress" section of www.socialsecurity.gov relating to subsidy application process and outreach activities

Products

The Subsidy Outreach effort will be supported by the development of products. The following list identifies the products that are being considered for production:

- Subsidy outreach talking points
- Posters
- Subsidy application (1020)
- Online subsidy application (i1020)
- Medicare outreach Intranet site
- Medicare outreach Internet site
- Training materials for third parties, states and non-profits
- Medicare subsidy publication for general public

- Worksheet/Checklist
- Tabletop display, banner stand and other graphic display products
- Message products (e.g., pill sorter boxes, sharpened pencils and jar openers)
- 800 number hold messages
- Columns and radio scripts for Media Information Page (MIP)
- Model letter for Congressional offices
- Model letter for third parties (advocates)
- Medicare subsidy publication for 3rd parties
- Stand alone CD/DVD to assist 3rd parties in completing scannable (paper) and electronic (Internet) subsidy applications
- PowerPoint/transparencies with talking points to assist Public Affairs Specialists in explaining how to complete scannable (paper) and electronic (Internet) subsidy applications
- Downloadable 8½" x 11" flyer to assist Social Security employees in announcing scheduled subsidy application events